Questions and Answers for the Public Awareness Marketing/Outreach Campaign

This is a summary of the questions submitted in response to the Public Awareness Marketing/Outreach Campaign RFP published by Minnesota Management and Budget for the Minnesota Health Insurance Exchange. It is the Exchange's intention, as indicated on page 5 of the RFP, to provide the responses to questions to all firms or individuals that requested copies of the RFP. Questions have been organized into topic groupings.

Responder

Question #1: Are companies ineligible (*Respondent Eligibility*) from responding if they currently work with an insurance provider that may offer plans and services as part of the Exchange (e.g., BCBS, HP, Medica)?
That paragraph means that a health carrier (insurance company) or similar entity is not eligible to submit a proposal for this work. If you are currently performing any marketing/communications work for a health insurance company or health provider, you should state that in your proposal in answer to the Conflicts of Interest section. Such information will be evaluated on a case-by-case basis to see if the scope of work may conflict with the responder's ability to provide the requested services.

Question #2: We have DBE (Disadvantaged Business Enterprise) certification and I'd like to know if this is what you refer to as Economically Disadvantaged Business?
To be given a six percent (6%) preference in the evaluation of a proposal, a Targeted Group Business (TGB) or Economically Disadvantaged Business or Individual must be certified with the State of Minnesota. Certification as a DBE by the federal government or another state or public entity does not qualify for the preference under this RFP. For more information, please review the "Preference to Targeted Group and Economically Disadvantaged Business and Individuals" section of the RFP "General Requirements" or contact the Department of Administration Materials Management Helpline at 651.296.2600.

Question #3: Are you looking for one agency to manage the entire campaign?
We are looking to contract with a single vendor. However, you will notice in the RFP that we have encouraged firms/proprietors to partner together in submitting proposals.

Question #4: Are partnerships and alliances with sub-vendors/contractors permissible by RFP responders?
Yes, they are encouraged.

Questions #5-7:

- Is there an opportunity for an agency that's out of state, but specializes in Healthcare?
- Is being an out-of-state agency a barrier to our successful consideration for this assignment?

- We wanted to make sure that you'd consider working with an agency based in Seattle and Spokane, WA.

We have not limited submissions to responders within the state. The RFP is open to responders from anywhere is the US.

RFP Process/Requirements

Question #8: Has there been any discussion of extending the deadline a week or so?
No. The deadline for proposal submission is March 18.

Question #9: Do you anticipate that there will be additional attachments?
There will not be additional attachments. The selected vendor will, of course, have access to the branding documents.

Questions #10-13:

- Is a teleconference feasible given that there apparently isn't a pre-bid conference scheduled?
- I noticed we missed the deadline for submitting questions. Are you accepting any additional questions or are you providing a round-up of the questions and answers already submitted?
- I did not have questions to you by yesterday, but wondered if I could be included in the overall response to questions tomorrow?
- We noticed questions from agency candidates might have been submitted by yesterday.

Answers to all the questions are summarized in this document. The document will be sent out to all requestors on March 8 and posted online.

Question #14: RFP "proposed agreement" states payment for services "after" they are performed. Would media buying fall under this same proviso? Typically, agency norms expect clients to pay for paid media and out-of-pocket costs like TV production, photography etc. before it runs/is produced.
Minnesota Statute 16A.065 prevents the Exchange from prepaying for services until they have been completed, including prepayment for media and other out-of-pocket costs like those identified.

Question #15: RFP refers to "work plan" under number 5 of the proposal content. Can you clarify or describe further? Or provide a sample you are used to working with?
A work plan is a summary of the steps you would take to deliver the project along with the corresponding timeline. You are free to submit the work plan in the style you prefer.

Question #16: On page 6, what does "segment" refer to in the statement "Provide detailed cost estimate for the segment"? Is segment the same as milestone so basically providing a detailed cost estimate for each "segment" of the campaign development and production process?
In this context, segment refers to the Tasks.

Question #17: You state that creative testing must be done with a minimum of six focus groups, one in each geographic area of the state. Is there a reason why you require the testing to be done via focus groups? Would you be open to considering other ways to validate the creative direction(s)? Or perhaps more groups in fewer locations, especially considering that the Salter Mitchell research found the Twin Cities to be quite representative of the rest of the state?
Because the Exchange is open to every Minnesotan and we will be conducting outreach to the entire state, not just the Twin Cities, we deem it very important to obtain feedback from all geographic areas

of the state. We are open to other modes of feedback collection if you can demonstrate that the quality of the information is as in-depth and useful for an equivalent or lower cost.

Question #18: On page 7 it states that proposal materials will become public information following respondent selection – are we correct to assume that does not include submitted cost estimates and that those will not be public information?
As identified in the RFP, the proposals become public record in accordance with Minnesota Statutes section 13.591, after the evaluation process is completed. Pursuant to statute, completion of the evaluation process occurs when the government entity completes negotiation of the contract with the selected vendor. The State will not consider prices submitted to be proprietary or trade secret and they also become public record after the evaluation process is completed.

Question #19: On page 6, Proposal Content, states "Proposals exceeding 15 pages per segment or 45 pages in total will not be considered." Please clarify what is meant by segment.
In this context, segment refers to the Tasks.

Question #20: When you say "proposed solution" are you looking for us to prepare a tentative approach and strategy for the RFP? Or something else?
Proposed solution is referring to your approach and/or process. Including specific ideas for this project or samples of past achievements will help us gauge if a vendor is the best fit for our particular needs.

Question #21: Is it OK to include staff bios instead of formal resumes?
Yes.

General

Question #22: Might you be able to share how many agencies are participating in the RFP?
I will not know that until the submission deadline has passed. Consistent with the Minnesota Government Data Practices Act, the State does not release the names of companies or individuals until the evaluation process is completed.

Question #23: Do you know approximately how many firms were solicited or received this RFP?
As the announcement of this RFP was made through a number of channels, and is posted on our website, it is not possible to pinpoint an exact number or range. We had requests to review the RFP from 75 entities.

Question #24-26:

- Did you contract with Himle Rapp for the report that was included, or what was the context for that work?
- Is Himle Rapp the selected PR firm for this initiative? Or can we also respond for PR activities?
- You appear to have a comprehensive PR plan from Himle Rapp. Will the chosen contractor work with them on that part of the campaign, or was their role to simply create the plan and the chosen contractor will help implement as part of their overall program?

We contracted with Himle Rapp to develop a strategic communications and social media plan. That contract has been fulfilled and is no longer active.

Question #27: Is there a defined per uninsured person marketing dollar amount we are trying to achieve which is part of the way the grants and/or government mandates are written?
No

Question #28: As one of the reports in the attachments indicates that the highest ranking official for the HIX for other states has been the designated spokesperson, are we to assume that April Todd-Malmlov is comfortable being the on-camera/on-air/video spokesperson?
Yes.

Question #29: We understand that Exchange staff regularly communicates with other state agencies. Have any concrete communications plans/activities already been discussed and/or planned for that we can take into consideration?
Discussions have taken place on how we can collaborate with other agencies but plans/activities have not been finalized at this point.

Question #30: We understand that Exchange staff has communicated with a number of community organizations. Have any concrete communications plans/activities already been discussed and/or planned for that we can take into consideration?
The Outreach, Communications and Marketing Work Group Report lays out in meticulous detail the communication and outreach channels for different audience groups. We have had discussions with some of the organizations mentioned in the report but have not completely finalized plans or activities.

Question #31: In one of the supporting documents, there is reference to submitting the final plan to HHS for feedback? Is that still the case? Does this include creative as well?
Yes, it would be shared as part of the certification process for state-based exchanges. Federal representatives periodically review our planning documents to verify that we are meeting the regulations for building an exchange and are on track to achieve critical milestones.

Questions #32-33:
- How about plan and creative review among other stakeholders at the State?
- Can you please describe the approval process with the various committee members as it relates to evaluating the plan, proposed tactics and creative? This will help us as we build out a timeline as well as understanding who are the stakeholders.

We are collaborating with the Departments of Commerce, Health and Human Services; MN.IT; Minnesota Management and Budget; the Governor's Office; and the Outreach, Communications and Marketing Work Group on communications, outreach and marketing elements to launch the Exchange. You should plan for a review/approval process that is similar to any cross-functional company or organization.

Question #34: Related to the public, we know there is a creative review that will occur via focus groups. Will the public also have an opportunity to comment on the plan (as other states have done)? How far could the plan and/or creative review go?
We always welcome public feedback. We have not yet determined if the marketing plan will be posted for public comments. See also the answer above.

Question #35: Some materials created for Farm Fest and State Fair are referenced in the attachments – can those materials be shared?

They can be viewed online under the *2.3: Outreach and Communication* materials at http://mn.gov/hix/planning-activity/certification/.

Questions #36: How would you define year 1 success – what would you want the newspaper headline to say next spring?
If you mean success in terms of the work performed, the criteria would be based on achieving the goals set for each task. It would be quite nice if the headline read "Minnesotans agree that the Exchange delivers as promised".

Question #37: Is there another campaign with similar goals that you look to as an example of success? Have you seen similar public education campaigns from Utah and/or Massachusetts? What did they do right? What could have been done better?
New ideas and past campaigns are analyzed for how they might work in Minnesota. There are lessons to be learned from Utah and Massachusetts, but also from states who are leading in developing modern exchanges.

Exchange Marketplace

Question #38: In a few simple words, what is the objective or mission of the HIX?
To ensure all Minnesotans have the security of health insurance. To create a statewide resource that provides access to private health insurance and public medical assistance programs.

Questions #39-40:

- Two of the principal barriers to the purchase of insurance which the research noted, are COMPLEXITY and PRICE. Since the proposed marketing program is launching before the Exchange is built, and presumably before the carriers have submitted their rates, what will we know about how easy the Exchange will be for a consumer or small business owner to navigate (i.e., reach a decision point), or about how aggressive premium prices will be compared to outside the Exchange?
- Do you have additional details on the specific carriers and plan types that will be offered on October 1? Are there final pricing and coverage tiers at all as it relates to addressing the affordability/value message (independent of available tax credit)? If this is still being determined, when do you believe that final specifics will be available?

The ease of navigating the website and selecting the appropriate coverage will become apparent when the Exchange begins accepting enrollment October 1, 2013. The infrastructure and website are, however, still being developed. Since legislation creating the Exchange has not yet been completed and signed into law, the Exchange does not have details on the carriers and the specific plans that will be marketed through the Exchange. You can view plan certification criteria online at http://www.mn.gov/hix/your-benefits/plan-carriers.jsp.

Questions #42-45:

- What role has been determined for brokers? Will they be compensated as navigators? Some other way?
- Can you provide additional insight on the latest conversations on the role of the broker in the exchange? Can you explain more about the Navigator program in development and potential touch points we can leverage from a marketing perspective?

- It is clear that small business owners trust their brokers and rely on their opinions when it comes to making these types of decisions. Will there be a "Connect with a Broker" function on the Exchange?
- What is the long term role of brokers in the process? Does the Exchange have existing relationships with brokers? Have they been brought along throughout the process as recommended by the research?

Our research clearly showed that agents/brokers are a very important assister to the small business owner for health insurance needs. Final policy decisions for the navigator/in-person assistance program will be determined through upcoming legislation. Options for the navigator/in-person assistance programs were discussed by the Navigator and Agents/Broker Work Group and can be viewed on our website: http://www.mn.gov/hix/your-benefits/agentsbrokerspartners.jsp.

Questions #46-49:

- Is there a winning name or working brand name for the Minnesota HIX?
- We understand that work has been developed as a result of the "branding development" initiative? Are you in a position to share this as we develop our proposal?
- There were six branding frameworks tested and while some had some positive aspects, none appeared to be a "winner" on its own. Has a definitive brand positioning been developed? Are you open to alternative positioning ideas based on the research?
- Have you selected a name yet for the Exchange?

Brand development is in the final process and will be concluded by the time the RFP vendor has been selected. Materials from that process will be shared with the selected vendor.

Question #50: How much of awareness is there currently in Minnesota about the coming HIX? Do you have any benchmark research beyond what has been provided?

The research clearly indicated that awareness is low.

Questions #51-52:

- Enrollment starts October 1, with coverage effective January 1. Is it rolling enrollment thereafter starting January 1? What is the coverage lag after enrollment after January 1, if any? Are there other enrollment considerations with regard to all audiences, including medical assistance?
- The enrollment target is up to 1.2 million Minnesotans. Are there specific end of year enrollment targets? Through March 2014? June 2014? By end of 2014?

Final policy decisions will be determined through legislative action. In-depth discussions on enrollment policies will be done with the selected responder. Projections for enrollment are generally discussed in the Gruber Gorman report which can be viewed online at http://www.mn.gov/hix/planning-activity/grants-reports/. Detailed target numbers will be shared with the selected responder.

Question #53: What software or systems does the State currently have to support and deploy marketing campaigns? For example, does the State have a mandated email marketing system?

We use GovDelivery for our e-mail marketing.

Questions #54-55:

- Can we see what the site will look like, how it will operate? Will be it be "straightforward, easy and fast" as recommended in the Salter Mitchell research study?
- Has the Exchange been designed yet? Is there an existing brand look & identity that we should work with?

The marketplace website is still under development and won't be available for review until this summer. It will be based on the recommendations of the Enroll UX project. You can see their demo at http://www.ux2014.org/rp/. See Questions #46-49 for brand info.

Question #56: Is there an audience group or segment that is the primary focus for the campaign/mass communications? For example, are the Base and Swing groups the primary mass comms target? Or is part of the assignment to make a recommendation on how to prioritize communications and budget?
The primary audience groups, as discussed in the supporting materials, are individuals, small employers and Medicaid qualifiers. Within each segment, we will expect the selected vendor to assist us in allocating our budget and efforts to first reach audience segments who are more open to the idea of an exchange.

Question #57: How may we access additional audience profile information for the target markets (beyond what is provided on page 26)?
We are happy to share whatever research we have compiled with the selected responder.

Question #58: Are we attempting to speak to the general population beyond the four audiences identified? In other words, is this a resource for everyone to use to better understand their insurance options or is it primarily for those who are under-insured or uninsured?
The campaign goal is to permeate awareness of the Exchange throughout Minnesota and drive targeted audiences to purchase health insurance on the Exchange.

Task 1

Questions #59-60:

- Are you expecting the responding agencies to show how they would approach and synthesize the existing research and input towards development the campaign—not the actual campaign itself in this March 18 timeframe? Please clarify whether or not you expect creative concepts as part of this RFP.
- Are you asking us to provide you with a full campaign plan including a theme and creative concept by March 18, or can that come later should we win the business?

Correct, we are looking for you to show approach and capability for the task, not an actual campaign by March 18. Creative concepts are part of the RFP.

Question #61: It seems that media is missing from the initial step to design a campaign, was that intentional?
If you are referring to media relations, that plan has already been developed by Himle Rapp in the strategic communications plan and will be implemented by Exchange staff. It will need to be used as framework to inform the development of the campaign and be rolled into the final comprehensive campaign plan.

Task 2

Question #62: At the close of this section, it's noted "the Exchange intends to exclude (commodity) printing from the scope of work under this contract." Does this mean that you would expect

responders to budget costs up to printable files and the Exchange would handle printing directly? Please clarify.
Correct. The Exchange will handle the printing.

Question #63: Was there a reason the collateral materials were defined before a multi-faceted campaign was designed?
The materials listed serve as a baseline of what we expect will be needed for the campaign. The selected responder will help us refine collateral needs.

Question #64: Page three of the RFP (task 2, item #1) requires a photo bank and testimonies from spokespeople. Is this group already identified or are we responsible for assembling this group?
While the group has not yet been identified, we intend to approach our partner stakeholders to assist in this area. The responder will provide logistical support.

Task 3

Question #65: Calls for a sample media plan as part of the response? Do you mean a sample plan showing how the agency has reached hard-to-reach audiences and diverse markets? Or our approach to building such a plan? Or are you looking for an actual plan for the Awareness/Outreach effort?
We are looking for your approach, as well as an example of a plan you created in the past that targeted hard-to-reach audiences and diverse markets, audiences similar to ours.

Question #66: Are there any commitments in place with any media company yet that will need to be taken into consideration?
No. We've had preliminary conversations but do not have any commitments.

Question #67: Are there any mandatory media vehicles or placements? For example, is TV mandatory?
Not really. Again, our goal is to permeate awareness of the Exchange throughout Minnesota and drive targeted audiences to purchase health insurance on the Exchange. Your proposal should address how you would, or have, achieved success.

Budget

Questions #68-73:
- Considering media is being sought for a $1.5 Million campaign, what percentage of the total marketing budget have you determined media to be? And, what part of the marketing budget is currently being allocated for public relations?
- As our firm prepares a work plan and associated detailed cost estimate, can you please provide further information around the overall available budget? Even a range? We know that the RFP outlines a specific cost for media placement ($1.5 million), yet does not include a budget amount for all other areas of work – such as PR, grassroots, event planning and execution, sponsorship, promotions, community outreach, other expenses.
- Is the $1.5 million inclusive of all media/advertising buys, including digital and non-traditional media placement? Direct marketing expenses? We also want to confirm that the $1.5 million does not include creative development and production costs.

- Stated media budget is $1.5 million. Is there any further budget information you can share that will help as we develop our cost plans and estimates? Production budget? Research budget? Agency fee expectations?
- The budget for the media purchases is estimated at $1.5million. Do you have an overall budget for the RFP that would include agency time to develop the plan as well as any out of pocket costs needed for the production of materials?
- The RFP outlines a media budget of $1.5 million. Can you please share additional information regarding anticipated budgets for out-of-pocket expenses and agency fees?

Correct, the RFP outlines media placement to cost an estimated $1.5 million for the campaign. For other areas of work, we are anticipating proposals that fall within a typical cost of the industry for work of this sort. Your replies will help us confirm a suitable overall budget for this project. The State does not pay out-of-pocket expenses.

Question #71: Of the $41 Million that MAXIMUS received as a contract from MN HIX, does any of that contracted dollars go to marketing or marketing strategy?
No

Campaign Implementation

Questions #72-77:
- At the bottom of page 1 of the RFP states that the “campaign implementation will be handled by the Exchange staff.” Please clarify what is meant by this? Does this include all the community outreach, PR, social media interactions, analytics and media placement?
- The RFP states that "Campaign implementation will be handled by the Exchange staff." Can you please provide more context to help us understand current and future capacity of Exchange staff to implement any campaigns so we can better develop our work plan and budget estimate. For example, what role (or percent role) with the Exchange staff have in implementing the following activities: Media Plans and Creative Placement, Social Media + Community Management, Public Relations + Public Affairs, Community Outreach (Town Halls, Forums, Etc.), Grassroots, Events, Direct Marketing/Response, Promotions
- What specific roles will/or may the Exchange look at hiring for to support this effort? Is there opportunity to hire for new roles if warranted based on plan recommendations?
- Are there any other specific expectations of respondents to handle campaign execution and implementation if you break out activities?
- At the bottom of page, 1, what do you mean by “campaign implementation will be handled by the staff”? How do you define campaign implementation?
- When you state that “campaign implementation will be handled by the Exchange staff,” does that include the meeting with and coordinating partnership activities?

Our vision for this RFP is that Exchange staff will handle media relations, community outreach, communications, social media, direct marketing, and promotion and corporate partnership implementation. The selected responder will handle creative development, promotion and corporate partnership development along with advertising analytics, negotiations, purchase, placement and account management. As the campaign is developed and new roles are necessitated, they will be discussed and assigned.